

CLAIMS

What is claimed is:

1. A method for formulating a stock Portfolio comprising the steps of :
 - establishing a database of a multiplicity of stocks;
 - applying preset parameters for filtering said stocks to form an Autoportfolio of selected stocks;
 - weighting each of said preset parameters that are applied to each of said selected stocks for generating a Rating for each stock of said Autoportfolio;
 - applying said weighted parameters including said Rating to said stocks of said Autoportfolio for establishing limits for issuing a BUY order for a selected stock when the preset parameters for purchase are met;
 - purchasing a predetermined number of the selected stocks which meet the preset parameters to establish a Portfolio;
 - setting a limit, related to said limits for issuing a BUY order, for selling a purchased stock from said Portfolio and for issuing a SELL order when said limit for selling is met; and
 - selling said purchased stock from said Portfolio and purchasing another stock which meets said preset parameters.
2. A method as in Claim 1, wherein said step of establishing a database includes

1 obtaining said database on a daily basis .
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4 3. A method as in Claim 1, wherein the step of weighting employs the
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6 parameters of (S1) earnings growth rate past 3 years; (S2) earnings growth rate
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8 current year; (S3) earnings growth rate estimate next year; (S4) earnings growth last
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10 quarter compared to same quarter 1 year ago; (S5) P/E, estimated; (S6) P/E Growth,
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12 current; (S7) P/E Growth, estimated; (S8) sales growth past 12 months; (S9)
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14 difference between sales growth rate from the previous 3 years to the last year;
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16 (S10) price momentum; (S11) capitalization; (S12) debt; (S13) dividend; and (S14)
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18 Rating.

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21 4. A system for formulating a stock Portfolio comprising :
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23 a database of a multiplicity of stocks;
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25 means for applying preset parameters to filter said stocks, thereby forming
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27 an Autoportfolio of selected stocks;
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29 means for weighting each of said preset parameters that are applied to each of
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31 said selected stocks for generating a Rating for each stock of said Autoportfolio;
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33 means for applying said weighted parameters including said Rating to said
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35 stocks of said Autoportfolio for establishing limits for issuing a BUY order for a
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37 selected stock when the preset parameters for purchase are met;
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39 means for purchasing a predetermined number of the selected stocks which

1 meet the preset parameters to establish a Portfolio;

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3 means for setting a limit, related to said limits for issuing a BUY order, for
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5 selling a purchased stock from said Portfolio and for issuing a SELL order when
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7 said limit for selling is met; and
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9 means for selling said purchased stock from said Portfolio and purchasing
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11 another stock which meets said preset parameters.
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15 5. A system as in Claim 4, wherein said means for applying preset parameters
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17 comprises selected ones of the parameters of S1) earnings growth rate past 3 years;
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19 (S2) earnings growth rate current year; (S3) earnings growth rate estimate next year;
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21 (S4) earnings growth last quarter compared to same quarter 1 year ago; (S5) P/E,
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23 estimated; (S6) P/E Growth, current; (S7) P/E Growth, estimated; (S8) sales growth
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25 past 12 months; (S9) difference between sales growth rate from the previous 3 years
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27 to the last year; (S10) price momentum; (S11) capitalization; (S12) debt; (S13)
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29 dividend; and (S14) Rating.
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